



*intelli-CTi*TM
for Microsoft Dynamics 365

Product Tour



Inbound Call Handling

Enhance your customer look-up



Outbound Dialing

Replace error-prone manual dialing



Call Flow Management (Lifecycle)

Enhance your customer experience



Post-call Processing

The power of intelli-CTi™ call wrap-up



Call Reporting, BI and Analysis

Explore the power of your data

Welcome to the intelli-CTi™

Product Tour

Explore how intelli-CTi™ for Dynamics 365 makes customer calls a breeze.

Manual phone tasks such as call tracking and caller recognition are now automatic.

Remove guesswork from your calls by having the likely context of the call ready to simply associate for your further records.

See how intelli-CTi™ users make better telephone calls.

Share siloed knowledge from your best employees and emulate best practice, delivering consistently great service to all customers.

intelli-CTi – Connect with your Customers

www.intelliCTi.com

intelli-CTi™
for Microsoft Dynamics 365





The screenshot displays the Microsoft Dynamics 365 interface. The main window shows a contact record for Daniel Thompson, with fields for First Name, Last Name, Job Title (Office Manager), Account Name, Email, Business Phone, Mobile Phone, Fax, Preferred Method of Contact (Any), and Address 1 (2601 Cambridge Drive). A timeline entry shows a 'Phone Call from Daniel Thompson - Yesterday 15:46'. An 'intelli-CTi Call Manager' window is overlaid on the right, showing a 'Virtual Telephony Server (VTS) (1234)' and an 'Active Call List [1]' with a call from 5553211234 to Daniel Thompson (Manager) with a duration of 00:00:19. A green callout box is positioned over the center of the screenshot.



About Inbound Call Handling

Empowering your Microsoft Dynamics 365 users to instantly take action of inbound telephone calls, to efficiently engage with customers in a professional and personalized experience.

A core capability of intelli-CTi™ provides fast and reliable caller recognition of inbound calls to intelligently identify the calling party and automatically associate them with information from Dynamics 365.

The following section outlines the power of intelli-CTi™ inbound call handling capabilities within Microsoft Dynamics 365



The screenshot displays the Microsoft Dynamics 365 interface for a contact named Daniel Thompson. The contact's information is shown in a table:

CONTACT INFORMATION	
First Name	Daniel
Last Name	Thompson
Job Title	Office Manager
Account Name	Bike Boutique
Email	daniel.thompson@ex...
Business Phone	(555) 321-1234
Mobile Phone	(555) 112-6652
Fax	---

The timeline shows several call activities:

- Today 09:29: Phone Call from Daniel Thompson - Today 09:29. Call From: Daniel Thompson. (Highlighted with a green box and the number 1)
- Today 09:27: Phone Call from Daniel Thompson - Today 09:27. Call From: Daniel Thompson.
- Yesterday 15:46: Phone Call from Daniel Thompson - Yesterday 15:46.

The right-hand pane shows the 'Inbound Call (5553211234)' details, including the caller's name, job title, email, and city.

Inbound Caller Recognition

1 intelli-CTi™ seamlessly provides contextual information from Dynamics 365 about the incoming caller. Automatic caller recognition is achieved through our unique Telephone Number Support (TNS).



The screenshot displays the Dynamics 365 Sales Hub interface. The main window shows 'My Active Contacts' with a search bar and a table of contact records. The 'Inbound Call' window on the right shows a list of match results for the incoming call.

Full Name	Email	Company Name	Business Pho...
Benno Kurmann	info@fineartschool.net	School of Fine Art	408-875-4571
Cathan Cook	Cathan@alpineskihouse...	Alpine Ski House	178-854-4566
Cliff Didcock	info@fineartschool.net	School of Fine Art	408-875-4572
Daniel Thompson	daniel.thompson@exam...	Bike Boutique	(555) 321-1234
Flemming Pedersen	info@consolidatedmess...	Consolidated Messenger	456-879-4573
Forrest Chand	Forrest@consolidatedme...	Consolidated Messenger	789-741-8556
Gary Schare	info@wingtip toys.com	Wingtip Toys	178-854-4571
George Li	georgeli@alpineskihou...	Alpine Ski House	111-587-4577
Hoe Yew Soon	hoeyew@consolidatedm...	Consolidated Messenger	789-456-7908

Find Caller	Match Results	Create
	Daniel Thompson Bike Boutique	<input type="checkbox"/>
	Forrest Chand Consolidated Messenger	<input type="checkbox"/>

Telephone Number Support (TNS)

1 TNS within intelli-CTi™ will not be limited to a single match about the incoming call, all possible matches for the inbound caller with an existing Dynamics 365 entity will be displayed.



The screenshot displays the Microsoft Dynamics 365 interface for a contact named Daniel Thompson. The contact's details, including first and last name, job title (Office Manager), and account (Bike Boutique), are visible. A timeline of call activities is shown, with two entries for 'Phone Call from Daniel Thompson' on 'Today' at 09:29. On the right, the Intelli-CTi Call Manager sidebar is open, showing an active call list and a 'Call Assistant' section. The 'Call Assistant' section is highlighted with a green box labeled '1' and shows the contact's name and account. A green box labeled '2' highlights the contact name 'Daniel Thompson' in the Dynamics 365 header.

Call Association

1 On association of the call, Intelli-CTi™ will screen-pop the agent to the entity in Dynamics 365.

2 A screen pop allows for reduced navigation time by navigating directly from Intelli-CTi™.





The screenshot shows the Dynamics 365 interface for a contact named Daniel Thompson. The contact information includes: First Name: Daniel, Last Name: Thompson, Job Title: Office Manager, Account Name: Bike Boutique, Email: daniel.thompson@ex..., Business Phone: (555) 321-1234, Mobile Phone: (555) 112-6652, and Fax: ---. The timeline shows two phone calls from Daniel Thompson on Today at 09:29. An Intelli-CTi Call Manager window is overlaid on the right, showing an active call list with one call from Daniel Thompson at 00:00:10. The call assistant window has a 'Call Assistant' field with the value '1' and a 'Reassociate' button. The 'Caller Content' section shows the contact's name and account name.

Reassociation

1

If by any chance you associated the wrong account, contact or lead, Intelli-CTi™ allows reassociation to take place to start the process again. Fixing the association without disruption to the conversation.



About Outbound Dialing

Improve the experience of Dynamics 365 users with increased calling accuracy, throughput and efficiencies gained by the capabilities of intelli-CTi™ outbound dialing.

intelli-CTi™ streamlines the making of outbound calls by reduced misdialing and removing the need to manually dial telephone numbers.

The following section outlines how intelli-CTi™ enhances the outbound calling experience of dialing Microsoft Dynamics 365 entities.

CONTACT INFORMATION

First Name	Daniel
Last Name	Thompson
Job Title	Office Manager
Account Name	Example Corp
Email	daniel.thompson@ex...
Business Phone	(555) 112-6652
Mobile Phone	
Fax	
Preferred Method of Contact	Any
Address 1: Street 1	2601 Cambridge Drive

Timeline

YESTERDAY

Phone Call from Daniel Thompson - Yesterday 15:46



The screenshot shows the Microsoft Dynamics 365 interface for a contact named Daniel Thompson. The contact information includes: First Name: Daniel, Last Name: Thompson, Job Title: Office Manager, Account Name: Bike Boutique, Email: daniel.thompson@ex..., Business Phone: (555) 321-1234, and Mobile Phone: (555) 112-6652. The timeline shows two phone calls from Daniel Thompson. On the right, the 'Dynamics 365 Dialer' window is open, showing a list of dial entities: Daniel Thompson, Gary Schare, Flemming Pedersen, and Cliff Didcock. Below the list, the dialer shows the dialing context for Daniel Thompson, including his Business Phone and Mobile Phone. A 'Dial' button is visible at the bottom of the dialer window. A green box highlights the dialer window and a '1' in a small box below it.

Dynamics 365 Dialer

1 The intelli-CTi™ entity dialer provides information based upon the context in Microsoft Dynamics 365. Select the telephone number to be dialed, saving time and associating the entity(s) to the active call.





Outbound Calling

Tour Menu

The screenshot displays two overlapping windows from Microsoft Dynamics 365. The left window shows the 'Contact: Contact' record for Daniel Thompson, with fields for First Name, Last Name, Job Title, Account Name, Email, Business Phone, Mobile Phone, and Fax. A green box highlights the Business Phone field with a '1' in the corner. The right window shows 'My Active Contacts' as a table with columns for Full Name, Email, Company Name, and Business Phone. A green box highlights the Business Phone column with a '2' in the corner.

Full Name	Email	Company Name	Business Pho...
Benno Kurmann	info@fineartschool.net	School of Fine Art	408-875-4571
Cathan Cook	Cathan@alpineskihouse...	Alpine Ski House	178-854-4566
Cliff Didcock	info@fineartschool.net	School of Fine Art	408-875-4572
Daniel Thompson	daniel.thompson@exam...	Bike Boutique	(555) 321-1234
Flemming Pedersen	info@consolidatedmess...	Consolidated Messenger	456-879-4573
Forrest Chand	Forrest@consolidatedme...	Consolidated Messenger	789-741-8556
Gary Schare	info@wingtip toys.com	Wingtip Toys	178-854-4571
George Li	georgeli@alpineskihou...	Alpine Ski House	111-587-4577
Hoe Yew Soon	hoeyew@consolidatedm...	Consolidated Messenger	789-456-7908

Click-To-Dial

1 Clicking hyperlinked numbers within Microsoft Dynamics 365 will make Intelli-CTi™ dial the number automatically.

2 Additionally clicking on the dial/phone icon in entity records will also perform this action in Intelli-CTi™.





The screenshot displays the Microsoft Dynamics 365 interface for a contact named Daniel Thompson. The contact's details, including first and last name, job title, account name, email, and phone numbers, are visible. A call log entry for a phone call from Daniel Thompson is shown. An Intelli-CTi Call Manager overlay window is positioned in the foreground, containing a call flow management diagram and a list of active calls.

About Call Flow Management (Lifecycle)

Actively encourage best practices within your Microsoft Dynamics 365 users with effective management and control throughout all aspects of telephone call interaction.

intelli-CTi™ empowers your users with access to caller contextual data, allowing them to easily access and efficiently manage information from Dynamics throughout the lifecycle of the call.

The following section outlines how intelli-CTi™ plays an active and intrinsic role in managing telephone calls within Microsoft Dynamics 365.

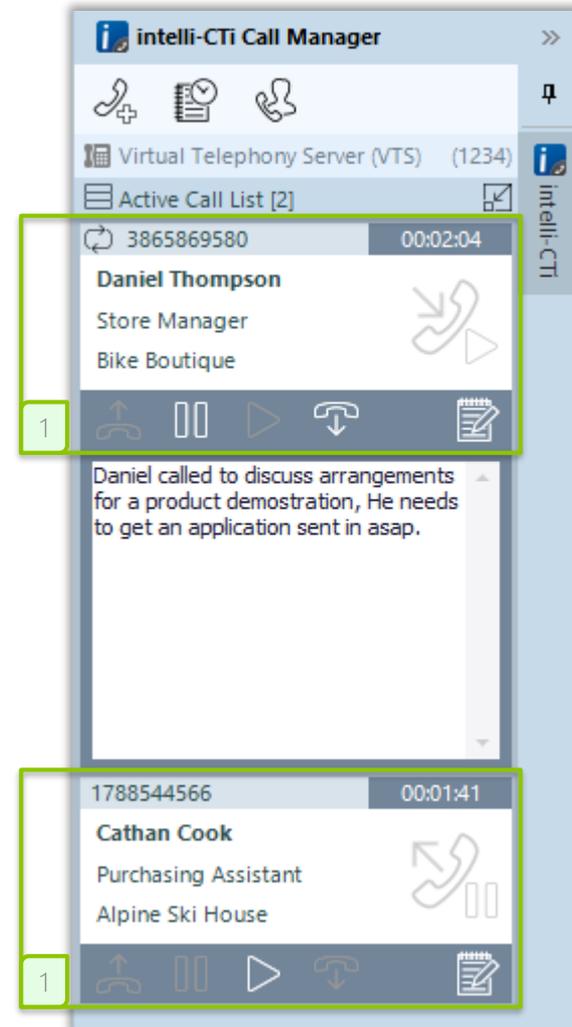


Call Controls

1 The intelli-CTi call controls provide quick and easy actions on any active telephone call. Automatically adjusting the call control buttons based on the call(s) state.

At the top of each call control, intelli-CTi provides additional information related to the call. This includes displaying CLI and DDI numbers (if present) with the ability to switch between them. Also present is a timer which will reflect the current call(s) connected/ring time.

Each call also visually indicates the call direction and state. intelli-CTi can handle complex multiple call situations with ease.





The screenshot displays the Dynamics 365 interface for a contact named Anders Madsen. The contact's details, including job title (Purchase Assistant) and account (Solid Bike Parts), are visible. A call log entry shows a phone call from Anders Madsen. On the right, the Intelli-CTi Call Manager panel is open, showing a call record with a duration of 00:08:26. A call assistant window is overlaid on the call record, displaying a note: "Anders called to discuss arrangements for a product demonstration. He needs to get an application installed asap." A green box highlights the call assistant window and the note text.

Caller Notes

1 Details of your conversation with the caller can be captured while on the telephone by selecting the Intelli-CTi™ Show/Hide In-Call Notes button on the Intelli-CTi™ call panel.

Here you can record details of the telephone conversation and additional notes while on the phone.





The screenshot displays the Dynamics 365 interface for a contact record. The contact is Daniel Thompson, Office Manager at Bike Boutique. The timeline shows two phone calls from Daniel Thompson. On the right, the 'Call Assistant' panel is open, showing call associations for the selected call. The associations include Daniel Thompson, Bike Boutique, and Bike Broken (CAS-01001-L9F0N3). A green box highlights the '1' in the call associations list.

Field	Value
First Name	Daniel
Last Name	Thompson
Job Title	Office Manager
Account Name	Bike Boutique
Email	daniel.thompson@ex...
Business Phone	(555) 321-1234
Mobile Phone	(555) 112-6652
Fax	---
Preferred Method of Contact	Any

Call Assistant - Association View

Call Associations: [Reassociate](#)

- [Daniel Thompson](#)
- [Bike Boutique](#)
- [Bike Broken](#)
CAS-01001-L9F0N3
Priority: Normal
Created: 27 Aug

Call Assistant – Association View

1 Once CRM content such as Cases and/or Opportunities have been associated to the call, these are displayed in the call associations section.





The screenshot displays the Microsoft Dynamics 365 interface for a phone call. The main window shows a record for a "Phone Call" with the subject "Follow-up call to Daniel Thompson" and a priority of "Normal". The call details include the caller "QGate", the recipient "Daniel Thompson", the phone number "5553211234", and the direction "Outgoing". The description reads: "Give a call back to Daniel after we have gained more information about the cause of the damaged part from the engineering team." On the right, the "Call Assistant" sidebar is open, showing a list of activities for the caller. The "Activities" section is highlighted with a green box and a "1" in a green square, indicating the selection of the activity view. The activities list includes "Follow-up call to Daniel Thom..." with a due date of "30 Aug" and "Call From: Daniel Thompson" with a due date of "04 Sep".

Call Assistant – Activity View

1 Selecting the Activity view within the Call Assistant provides a list of open Activities for the related caller. Each activity can be selected and shown in Microsoft Dynamics 365.



The screenshot displays the Dynamics 365 interface for a case titled "Brake Lever Damaged". The case is in the "Phone to Case Process" and is currently in the "Identify" stage of a process that includes "Identify", "Research (< 1 Min)", and "Resolve". The "Call Assistant" sidebar is open, showing a list of cases including "Bike Broken", "Brake Lever Damaged", and "CAS-01000-P6M3F7". The sidebar is highlighted with a green box, and a small green box with the number "1" is placed next to it, indicating that the Call Assistant provides access to additional Dynamics 365 information such as Cases.

Call Assistant – Cases View

1

The Call Assistant provides access to additional Dynamics 365 information such as Cases. Cases can be selected, created and associated to the current call. Each Case can be selected and shown in Microsoft Dynamics 365.



The screenshot displays the Microsoft Dynamics 365 Sales Hub interface. The main window shows an Opportunity record for "25 Road Bikes Next Quarter" with an estimated close date of 14/02/2020. The sales process is currently in the "Develop" stage. The sidebar on the right, titled "Call Assistant", is highlighted with a green box and a "1" in a small box. This sidebar provides access to Dynamics 365 information, including a list of Opportunities. The "Opportunities" section is expanded, showing "25 Road Bikes Next Quarter" with an estimated revenue of £52,229.95 and a rating of "Warm". Below this, there is a "New Bikes (10x)" option. The sidebar also includes a "Create New" button and an "Associate" button.

Call Assistant – Opportunities View

1 The Call Assistant provides access to additional Dynamics 365 information such as Opportunities. Opportunities can be selected, created and associated to the current call. Each Opportunity can be selected and shown in Microsoft Dynamics 365.



About Post-Call Processing

Ensure that after every telephone call your users are capturing with ease all the relevant customer information right within Microsoft Dynamics 365. Distilling notes, history, and managing every follow-up action to build stronger future customer engagements.

intelli-CTi™ post-call processing automatically brings together all of the relevant touch-points from the call into a single management pane, enabling the Dynamics 365 users to quickly and easily capture, manage and close off the call.

The following section outlines the efficiencies and true value of intelli-CTi™ post-call handling.



Call Wrapup Overview

1 The initial view of the Call Assistant shows the call associations to the current call/caller (e.g. Microsoft Dynamics 365 Contact).

Each telephone call is automatically related to CRM Activity/History (Phone Call). Notes taken during the call are featured within the intelli-CTi™ Wrapup and can be updated, including the subject. Followed by Automatically being included within the Dynamics 365 Activity/History.

2 If a telephone call was related to a Microsoft Dynamics 365 entity (such as a Dynamics 365 Case), this is featured in the telephone call Wrap-up.

The screenshot shows the 'Telephone Call Wrapup' window. At the top, it displays 'Call Direction (Result): Inbound (Established)' and 'Call Started (Duration): 29 Aug 2019 14:45 (00:15:07)'. Below this, there is a 'PHONE CALL ACTIVITY' section with a telephone icon. The 'Association' is 'Daniel Thompson, Bike Boutique' and the 'Subject' is 'Call From: Daniel Thompson'. A text area contains the following notes: 'Received a call from Daniel to say that the brake lever on the new bike we shipped him was damaged on arrival. I have offered to ship him a replacement lever immediately for which he was happy. After the call I contacted shipping and arranged for the replacement part to be shipped as soon as possible.' Below the notes is a 'Call Disposition' dropdown menu set to 'Order Inquiry', a checked 'Auto-complete existing activity' checkbox, and buttons for 'Create Follow-up' and 'Open Phone Call'. The bottom section shows a 'CASE (CAS-01000-P6M3F7)' with the subject 'Brake Lever Damaged'. It lists 'Priority: Normal', 'Created on: 29 Aug 2019', and 'Status: Active'. There are buttons for 'Resolve Case', 'Cancel Case', and 'Open Case'. A 'Remove Call Relationship' link is also present. The window has an 'OK' button at the bottom right.



Resolving Cases/Opportunities

1 intelli-CTi™ provides the ability to quickly and easily manage related Microsoft Dynamics 365 Cases directly from within the Call Wrap-up process. A Dynamics 365 Case can be resolved or cancelled during the wrap-up, and further information can also be captured.

- Recording key features back into Dynamics 365, including the resolution process, billable time and description.

intelli-CTi for Dynamics 365 - Telephone Call Wrapup

Telephone Call Wrapup

Call Direction (Result): **Inbound (Established)** Call Started (Duration): **29 Aug 2019 14:45 (00:15:07)**

PHONE CALL ACTIVITY

Resolve Case

Subject: Resolve Case

Resolution Type * **Problem Solved**

Resolution * **Sent customer a replacement part**

Total Time **11 Minute**

Billable Time * **0** Minute(s)

Description
Customer received shipment of bike, upon arrival the brake lever was damaged. So we sent a replacement part to the customer.

1

OK Cancel

CASE (CAS-01000-P6M3F7) [Remove Call Relationship](#)

Brake Lever Damaged

Priority: **Normal** Created on: **29 Aug 2019** Status: **Active**

Resolve Case Cancel Case Open Case

OK



Follow-ups & Call Disposition

1 Track the outcome of all your calls by setting a customizable call disposition. Describing the outcome of the calls allows the optimization of phone call performance and sales processing. All tracked in Microsoft Dynamics 365 within intelli-CTi™'s powerful Call History.

2 Based on the ended call, intelli-CTi™ provides a quick action to create a follow up call with the associated Account, Contact or Lead. Automatically taking the subject, notes and associations to the scheduled call. You can then set due date for the follow-up call and any other details.

intelli-CTi for Dynamics 365 - Telephone Call Wrapup

Telephone Call Wrapup

Call Direction (Result): **Inbound (Established)** Call Started (Duration): **29 Aug 2019 14:45 (00:15:07)**

PHONE CALL ACTIVITY

Association: [Daniel Thompson, Bike Boutique](#)

Subject:

Received a call from Daniel to say that the brake lever on the new bike we shipped him was damaged on arrival.

I have offered to ship him a replacement lever immediately for which he was happy.

After the call I contacted shipping and arranged for the replacement part to be shipped as soon as possible.

1

Call Disposition: **Order Inquiry**

Auto-complete existing activity

CASE (CAS-01000-P6M3F7)

Brake Lever Damaged

Priority: **Normal** Created on: **29 Aug 2019** Status: **Active**



The screenshot displays the Microsoft Dynamics 365 interface for a contact named Daniel Thompson. The contact's summary card is visible, showing fields for First Name, Last Name, Job Title, Account Name, Email, Business Phone, Mobile Phone, and Fax. Below the contact information, there is a timeline of activities, including a 'Phone Call from Daniel Thompson' recorded yesterday at 15:46. An Intelli-CTi Call Manager overlay window is open on the right side of the screen, showing a 'Virtual Telephony Server (VTS) (1234)' and an 'Active Call List [1]' with a call record for Daniel Thompson (Manager) with a duration of 00:00:19. A green callout box is overlaid on the center of the screenshot, containing the title 'About Call Reporting, BI and Analysis' and three paragraphs of text.

About Call Reporting, BI and Analysis

Realize full visibility of the engagement you make with your customers over the telephone, with Business Intelligence (BI) reporting and analysis gained from the rich telephony information held within your Microsoft Dynamics 365.

With Intelli-CTi™ every telephone call interaction (both inbound and outbound) is automatically recorded (statistically) within Dynamics 365, along with details of the call metrics, each is stored with context to the related Dynamics entities, history and activities.

The following section outlines Intelli-CTi™ telephone call statistics recorded within Microsoft Dynamics 365.



Call Reporting and Analysis

Dynamics 365 Sales Hub

CALL HISTORY
Call From: Daniel Thompson

Call Relationships | Call Notes | Call Timings | Call Info

Account: **Bike Boutique**

Contact: **Daniel Thompson**

Case: **Brake Lever Damaged**

Call Disposition: **Order Inquiry**

intelli-CTi - Operational Performance

Average Call Duration (Secs) by User

Inbound Calls (Last 12 months)

User	Avg Call Duration (Secs)
John Smith	0
Tom Peters	153
QGate Software	410

Top 10 Contacts

Active Call History (Last 12 months)

Contact	Count
(blank)	299
Lou Balbo	88
Abigail Brown	31
Dean Drew	15
Aaron Fettig	10
A Doreen	10

Call Results

Active Call History (Last 12 months)

Contact	Count
Lou Balbo	367
Abigail Brown	156
Aaron Fettig	15
Dean Drew	4

Average Call Duration (Secs) by User

Outbound Calls (Last 12 months)

User	Avg Call Duration (Secs)
Tom Peters	27
QGate Software	256

Call History Analysis

For each Microsoft Dynamics 365 entity that relates to a telephone activity, intelli-CTi™ provides a detailed log of telephone call interactions. Detailed statistical information about every telephone call both inbound and outbound can be used to create powerful and stunning dashboards.



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www.intelliCTi.com

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